CHAPTER 1: INTRODUCTION

Policies to promote demand-driven smallholder agriculture and improved urban food marketing system performance in Sub-Saharan Africa (SSA) need to be informed by urban food consumption patterns, especially given the rapid rate of urbanization in many SSA countries. Governments, donors, and other policymakers require an up-to-date understanding of urban consumption patterns because these are main drivers of many of the opportunities available to small-scale farmers and because such information can help identify key leverage points to improve urban marketing system performance.

Although there have been urban consumption studies conducted in Zambia in the past, the last major survey of urban consumers’ behavior was done in 1991 (the Zambian Household Expenditure and Incomes Survey, HEIS). Current consumption patterns in Zambia may differ markedly from those of the early 1990s. To obtain updated information on urban consumers’ behavior, the Zambia Urban Consumption Survey (UCS) was conducted in August 2007 and February 2008 in Lusaka, Kitwe, Kasama and Mansa by the Zambia Central Statistical Office (CSO) in collaboration with the Zambia Food Security Research Project (FSRP). (See CSO/FSRP 2007 a, b and c, and CSO/FSRP 2008 a and b).

The primary objective of this survey is to develop a detailed understanding of the food and other consumption and expenditure behavior of households in key urban areas of Zambia. Key aspects of this behavior are consumer budget shares across different food groups and specific food items, and the market share of different types of retail outlets such as open air markets, street vendors, shops, supermarkets, and others. The idea is to understand how these consumption and expenditure patterns vary seasonally, by the income level of the households, and by households’ location. This information is important for two reasons. First, rapid urbanization in Zambia is placing heavy demands on urban marketing systems. Investment in these systems has been woefully inadequate, and understanding these two dimensions (product mix and retail outlet shares) of urban expenditure patterns is a first step in addressing these problems. Second, government policy is heavily focused on maize. But if consumption and expenditure patterns have changed over the course of more than a decade of economic reform, policy needs to reflect this.

This report outlines overview findings of the whole survey presented with mainly tables and figures and highlights in bullet point form with some explanations/discussions where necessary. Additional and detailed sub-sector (such as staples, horticulture, etc) reports are being developed to further analyze and extrapolate urban consumer behavior issues (FSRP Working Papers No. 42 and 44; FSRP Policy Synthesis No. 36). This report is organized in chapters: the following chapter looks at the survey background and design methodology and is followed by Chapter 3 on general concepts and definitions covering demographic terms, retail outlets, location of food outlets, food consumption and urban agriculture.

Actual survey findings start from Chapter 4 on characteristics of surveyed households, looking at demographic characteristics of households as well as household mortality. Chapter 5 looks at general household expenditure made up of food and non food items with the non food items decomposed into a number of broad categories. Having looked at the shares of food in total food expenditure, Chapter 6 examines the relative shares of the broad food categories, that of staples and other foods, fruits and vegetables and food bought and consumed away from home. The relative importance of various retail channels for staples and fruits and vegetables are also explored in this chapter.
Issues relating to urban agriculture are looked at in Chapter 7, concentrating on maize, sweet potatoes, cassava, vegetables and fruits including urban households’ use of fertilizer in these crops, and livestock ownership including production and sale of livestock by-products. Chapter 8 examines household ownership of assets and their utilization of charcoal and firewood while Chapter 9 assesses households’ links with rural areas in terms of sending and receiving cash and goods, and finally Chapter 10 reviews households’ own assessment of food security status.

All the analyses used in Chapter 4 to 10 were based on the urban area, adult equivalent tercile of total expenditure, category of residential neighborhood and gender of head of household. Each of these chapters started with a brief introduction and ended with a brief summary of key issues identified.